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WSSFC 2026

Practice Management Track – Session 5

Marketing on a Small Budget

Presented By:

Stacy J. Schlemmer
Peterson, Berk & Cross, S.C., Green Bay

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Peterson, Berk & Cross, S.C., Green Bay

About the Presenters...

Mike McKay is a founding Member and Majority Shareholder in ActionCOACH Milwaukee #1, LLC. After an undergraduate degree in Mathematics from Ripon College, Mike served 4 years in the US Army in Korea and Ft. Carson, CO. Then working in public and private manufacturing companies, Mike achieved his goal of becoming an executive of a billion-dollar company as Vice President, Global Supply Chain for Sanford Brands. He left the corporate world to start his ActionCOACH practice in 2012. Now an ActionCOACH Global Hall of Fame Member, and published author, Mike specializes his coaching on growing businesses and leaders.

Erin R. Ogden is a trademark and copyright nerd who loves helping businesses grow. Whether helping clients directly or working with other attorneys to help their clients, she helps identify, protect, and monetize intellectual property while looking at the business holistically. Her firm's points of culture are Make things as simple as possible, but no simpler; Play well with others; Speak English, not legalese; and Be the reason it works. She loves putting that into practice with her colleagues and business clients. Drop her a line or connect on social media. We'll nerd out together!

Stacy J. Schlemmer has been practicing family law since 2009. Stacy focuses her practice primarily on divorce, legal separation, maintenance, property division, paternity, child support, custody, and placement. Stacy is actively involved in the community and has been involved in Service League, Women's Fund, Current Young Professionals, and served on the Board of Directors for the De Pere Area Chamber of Commerce for over 10 years as well as numerous other boards over her career. In 2015 Stacy was named one of the Greater Green Bay Chamber of Commerce's Future 15 Young Professionals. In 2016 Stacy was named one of YOU Magazine's "10 Women to Know" in Green Bay. Stacy is from the Green Bay area, graduating from West De Pere High School. Stacy graduated from the University of Wisconsin with a Bachelor of Arts degree, cum laude, after only three years of undergraduate study and was a member of the National History Honor Society. She then graduated from Marquette Law School, where she was a member of the Marquette Elder's Advisor Law Review and served as an Academic Support Program Leader. When she is not working in or on her law practice, Stacy loves to be outdoors, preferably cycling or hiking with her husband or traveling and exploring new places near and far!

LAW FIRM MARKETING ON A SHOE STRING BUDGET

Presented by:

Attorney Stacy J. Schlemmer, Peterson, Berk & Cross, S.C.—Green Bay, Wisconsin &
Attorney Mackenna T. Zimmerman, Peterson, Berk & Cross, S.C. – Green Bay, Wisconsin

I. CHALLENGES OF LIMITED BUDGET

- **a. Limited time & staff**
  - i. Difficulty maintaining consistency
  - ii. Limited ability to compete with larger firms
  - iii. Coming up with content
- **b. Finding the right audience**
  - i. Limited reach
  - ii. Building name recognition takes time
- **c. Figuring out where to get money & how to spend the money**
  - i. Difficulty measuring ROI
  - ii. Limited ability to experiment
- **d. The "feast or famine" problem**
  - i. Small firms may increase marketing when business is slow & stop when they are busy which creates inconsistency

II. LOW COST MARKETING TACTICS

- **a. 4-Low Cost Marketing Tactics you can Implement Immediately:**
  - **i. Social Media Presence**
    1. Professional Facebook, Instagram, and/or LinkedIn pages
    2. Video platforms like YouTube or TikTok
  - **ii. Content Creation**
    1. Blogs for use on social media, website, newsletters, or magazines
    2. Short videos or reels to be shared on social media
    3. Informational videos or seminars to share on website, YouTube, or another streaming platform
    4. Podcast focused on promoting your brand and sharing information
  - **iii. Making Connections**
    1. **Coffee meetings**
       a. Invite someone you connected with to coffee to learn more
    2. **Follow up with people you already know**
       a. Be intentional about staying in touch
    3. **Use social media to create real-world connections**
  - **iv. Local Events**
    1. **Networking groups**
       a. Local business associations
       b. BNI or HBBA
       c. Professional organizations

2. **Local Chamber of Commerce**
    a. Business after hours events
    b. Ribbon cuttings
    c. Community events
3. **Professional & Community Organizations**
    a. Nonprofit boards
    b. Service organizations
    c. Local committees
    d. Volunteer opportunities
4. **Host Your Own Events**
    a. Open house
    b. Informational seminar (virtual or in-person)
    c. Partner with other professionals to co-host

III. TRADITIONAL MARKETING vs. BUDGET MARKETING

a. Traditional Marketing Examples:

i. Billboards
ii. Print advertising
iii. Radio/TV
iv. Direct mail
v. Large event sponsorships

b. Typical Characteristics of Traditional Marketing:

i. Broad audience
ii. Higher upfront cost
iii. Can create significant visibility
iv. Longer commitments
v. Results/ROI can be difficult to measure immediately
vi. Less flexibility once underway

c. Low-Budget / Relationship-Based Marketing Examples:

i. Networking events / coffee meetings
ii. Social Media (Facebook, Instagram, LinkedIn, etc.)
iii. Self-produced content creation (blogs, short videos, podcast, etc.)
iv. Referrals
v. Community involvement
vi. Speaking engagements
vii. Informational seminars
viii. Direct outreach
ix. Following up with existing connections

d. Typical Characteristics of Low-Budget / Relationship-Based Marketing:

i. Targeted reach- focus on specific people, industries, or referral sources
ii. Lower cost- relies more heavily on time & relationships than advertising dollars

iii. Faster feedback- you can quickly see whether people are engaging
iv. Easy to adapt- change your approach based on what is working
v. Relationship driven- focuses on building trust and familiarity
vi. More personal- allows potential referral sources & clients to get to know you

IV. STRATEGIC MARKETING PLANNING

a. Audit Your Past Clients – *Look at who is already hiring you*

i. What types of matters are most common?
ii. Who are your most profitable clients?
iii. Where did those clients come from?
iv. What industries, demographics, or communities are represented?
v. Identify patterns and opportunities
1. **Ask:** *Who is already choosing us?*

b. Create Client Personas- *Turn patterns into a picture of your ideal client*

i. What legal issue brings them to you?
ii. What are their priorities and concerns?
iii. What questions are they asking?
iv. Where do they look for information?
v. What other professionals do they interact with?
1. **Ask:** *Who are we trying to reach?*

c. Validate with Data & Track – *Don't rely solely on assumptions*

i. Track how new clients found you
ii. Monitor website/social media engagement
iii. Track referrals and referral sources
iv. Look at which practice areas generate inquiries
v. Compare marketing time/money spent with actual results
1. **Ask:** *Is our strategy actually working?*

d. Create Targeted Content – *Create content based on what your ideal client actually needs*

i. Answer frequently asked questions
ii. Address common misconceptions
iii. Create practical guides/checklists
iv. Write blog posts or newsletters
v. Make short educational videos
vi. Tailor content to specific practice areas or audiences
1. **Ask:** *What information would be genuinely useful to them?*

e. Optimize Your Marketing Channels- *A few effective channels are better than trying to maintain all of them*

i. Website/SEO
ii. Google Business Profile
iii. LinkedIn/social media
iv. Email newsletters

v. Community events
vi. Seminars
vii. Paid advertising, when appropriate

f. **Revise Networking & Referral Strategies**- ***Be intentional about who you're building relationships with***

i. Identify your strongest referral sources
ii. Identify gaps in your referral network
iii. Connect with professionals who serve your target clients
iv. Schedule regular coffee/networking meetings
v. Follow up with existing contacts
vi. Consider referral partnerships and co-hosted educational events
vii. Evaluate which networking groups are actually worthwhile

1. **Ask:** *Are we building relationships with the people who can connect us to the clients we want to serve?*

V. CREATING YOUR CIRCLE OF INFLUENCE

a. Identify key people

i. Past classmates and colleagues
ii. Other attorneys
iii. Professionals who serve your ideal client
iv. Business owners & community leaders
v. Existing referral sources

1. **Ask:** *Who already knows me, and who should know me?*

b. Attend networking events

i. Put yourself in spaces where relationships can develop
ii. Set a goal at events (e.g. have 3 meaningful conversations)

c. Engage in public forums

i. Become visible and contribute something useful
ii. Don't just promote yourself- participate in conversations, share knowledge, and answer questions

d. Set up coffee meetings

i. Turn acquaintances into actual relationships
ii. Focus on relationships building, and referrals will follow naturally

e. Collaborate on projects

i. Create opportunities for people to work alongside you
ii. Collaboration gives people a chance to experience what it's like to work with you- builds trust

f. Provide unique value- ***Give people a reason to remember you!***

i. Share useful resources
ii. Make introductions between contacts
iii. Help promote another person's event
iv. Share referrals when appropriate

g. THEN REPEAT!!

VI. HOW TO DO THIS & HOW DO YOU KNOW IT'S WORKING?

a. Delegate

i. If you have a team and/or staff, delegate tasks and make sure each person understands their role (e.g. create committees and checklists)

b. Schedule set times for goal setting, content creation, planning, etc.

i. Meet with your team/committees monthly or quarterly to discuss progress, set goals, and strategize

ii. If you are solo, set time to do personal retreats to focus on personal goal setting, and create a detailed action plan for marketing and content creation

c. Track the Client Pipeline

i. Call & consult tracking information:

1. Practice area and attorney
2. How they heard about you / referral source
3. If consult was scheduled
4. If they retained you
5. If they were referred out, why?
6. If they didn't retain, why?
7. Total calls per practice area and attorney

d. Measure the Conversion

i. Consultation conversion rate

1. *Clients retained / consultations = consultation conversion rate*

e. Review and Adjust

i. Compare consultation conversion rate against your referral sources

1. You may discover interesting patterns which allows you to pivot and spend your limited time & money where it is actually producing results

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THE CHALLENGE OF LIMITED BUDGETS

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TRADITIONAL MARKETING: HIGH COST, BROAD REACH, SLOWER FEEDBACK.

BUDGET MARKETING: LOW COST, TARGETED REACH, FASTER ADAPTATION.

EXAMPLE: PAID AD CAMPAIGN VS. COLLABORATIONS OR CONTENT CREATION.

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NEXT STEPS TO GET STARTED

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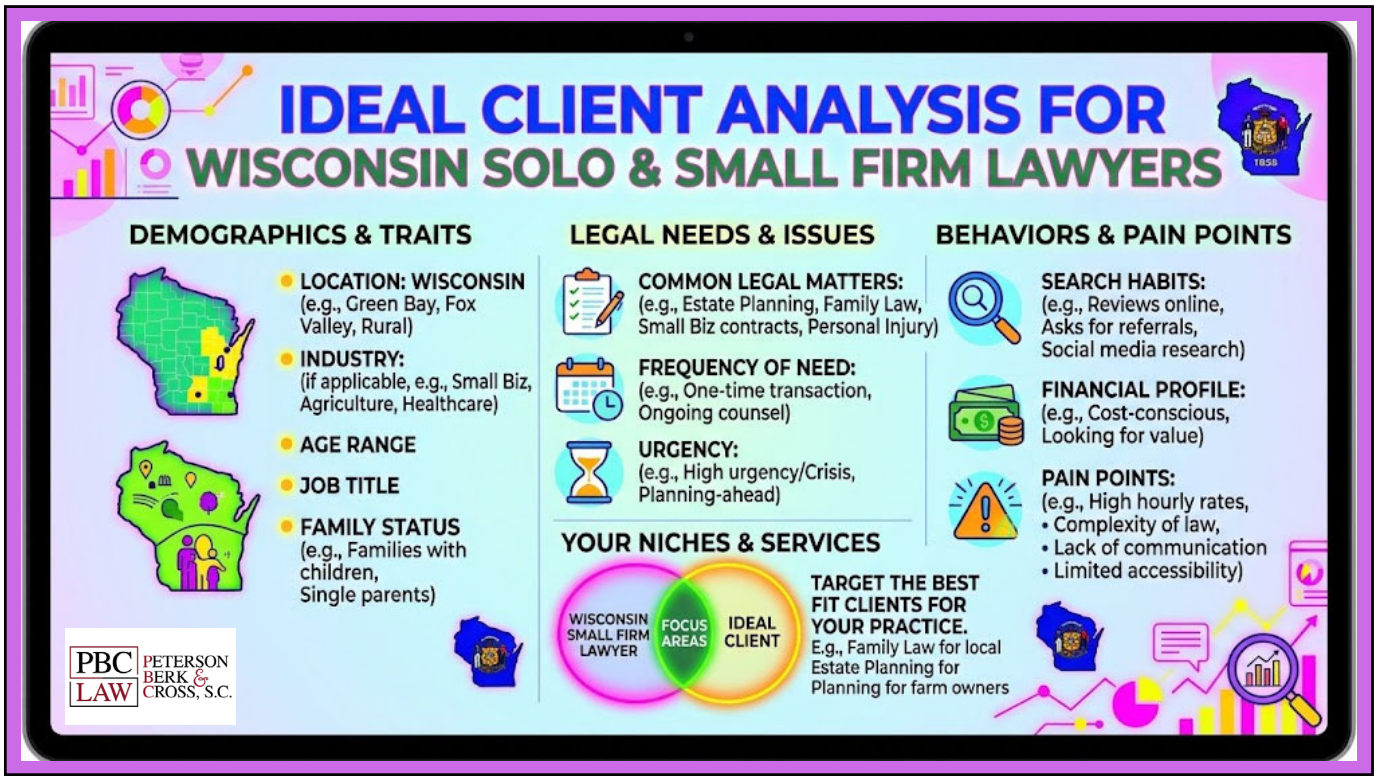
IDEAL CLIENT ANALYSIS FOR
WISCONSIN SOLO & SMALL FIRM LAWYERS
DEMOGRAPHICS & TRAITS
LOCATION: WISCONSIN (e.g., Green Bay, Fox Valley, Rural)
INDUSTRY: (if applicable, e.g., Small Biz, Agriculture, Healthcare)
AGE RANGE
JOB TITLE
FAMILY STATUS (e.g., Families with children, Single parents)
LEGAL NEEDS & ISSUES
COMMON LEGAL MATTERS: (e.g., Estate Planning, Family Law, Small Biz contracts, Personal Injury)
FREQUENCY OF NEED: (e.g., One-time transaction, Ongoing counsel)
URGENCY: (e.g., High urgency/Crisis, Planning-ahead)
BEHAVIORS & PAIN POINTS
SEARCH HABITS: (e.g., Reviews online, Asks for referrals, Social media research)
FINANCIAL PROFILE: (e.g., Cost-conscious, Looking for value)
PAIN POINTS: (e.g., High hourly rates, • Complexity of law, • Lack of communication • Limited accessibility)
YOUR NICHES & SERVICES
WISCONSIN SMALL FIRM LAWYER
FOCUS AREAS
IDEAL CLIENT
TARGET THE BEST FIT CLIENTS FOR YOUR PRACTICE.
E.g., Family Law for local Estate Planning for Planning for farm owners
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MY NETWORKING SPHERE OF INFLUENCE
MY NETWORKING
PROFESSIONAL & BUSINESS CONTACTS
GOOD REFERRAL SOURCES: CPAs & Accountants
GOOD REFERRAL SOURCES: Real Estate Agents
GOOD REFERRAL SOURCES: Financial Planners
GOOD REFERRAL SOURCES: Non-Competing Lawyers
GOOD REFERRAL SOURCES: Insurance Agents
GOOD REFERRAL SOURCES: Business Owners/CEOs
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*Participants: Fill in specific names or organizations in the blank spaces.

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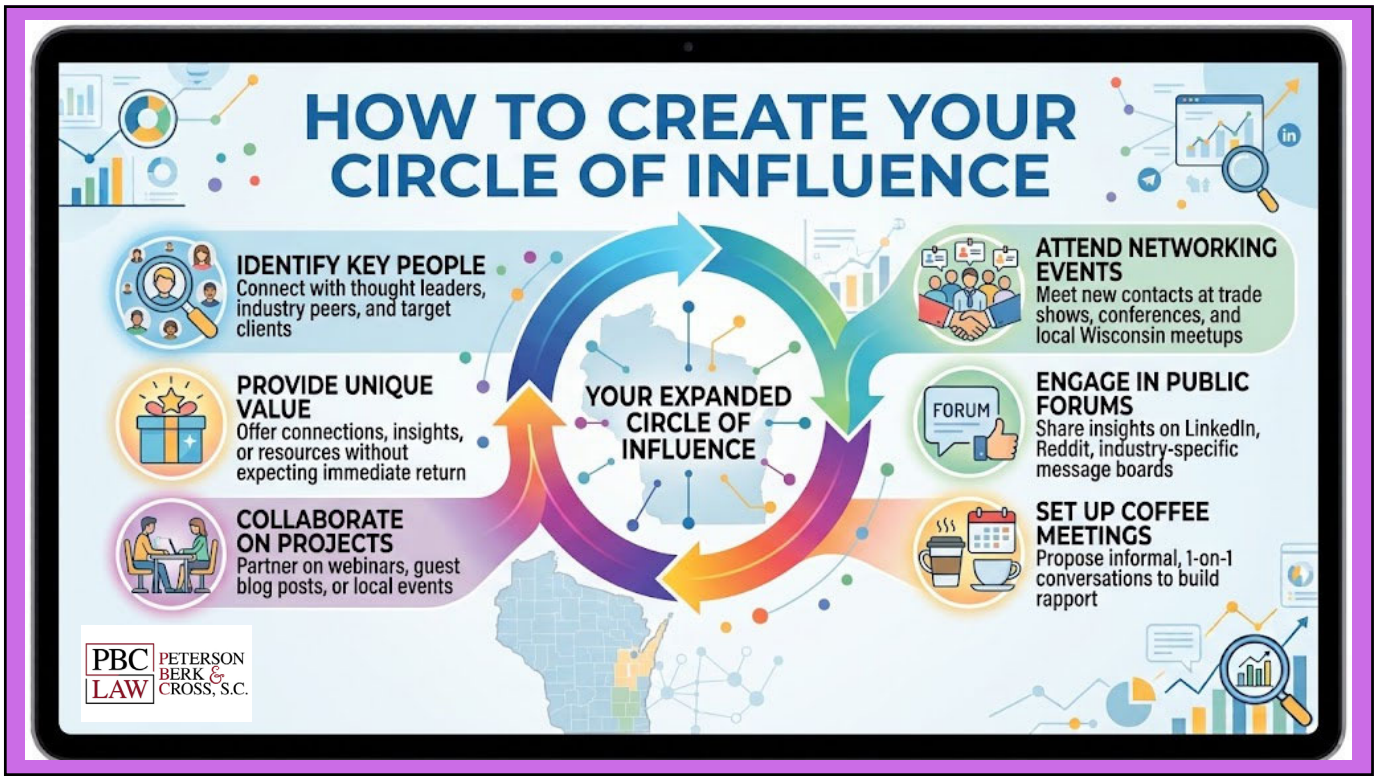

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HOW& WHEN DO I DO THIS?

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How do I know what's working?

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Rapid fire suggestions

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QUESTIONS?

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